

eReferral Webinar Series

Presented by the West Region Deployment Team at Amplify Care

QUESTIONS & ANSWERS

The West Region eReferral Deployment Team from Amplify Care hosted an eReferral Webinar Series, which ran weekly from February to April, 2026. This series covered Ocean eReferral workflows for web-based Ocean users, as well as Ocean users integrated with Accuro, TELUS PS Suite, and OSCAR Pro EMRs.

A wide range of thoughtful questions were received through the sessions and are compiled below, organized by general Ocean questions and then by EMR so you can quickly access the information most relevant to you.

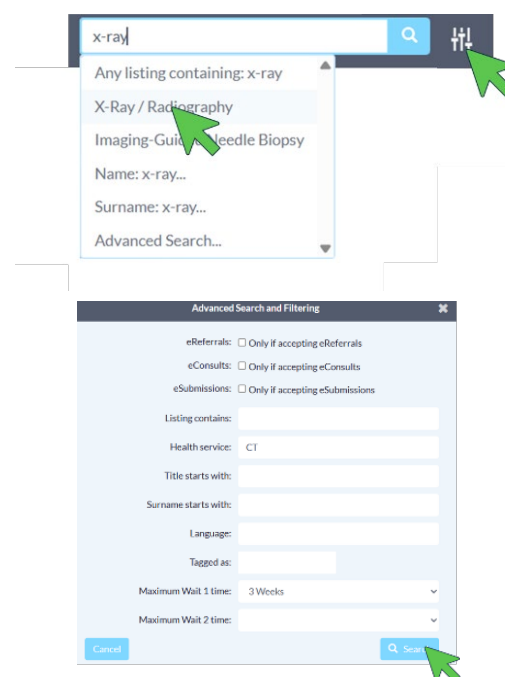
If you were unable to attend our webinars, you can access the recordings on our [Amplify Care website](#).

General Ocean eReferral Questions:

Q: How do we see wait times in the Ocean Healthmap?

A: To see wait times in the Ocean Healthmap, search for a specific health service (e.g., 'x-ray') by typing in the service and selecting from the dropdown. When the list of options is generated, you will see both a Wait Time column and a Distance column.

Alternatively, you can search by using the filter feature (see image to the right) to enter the health service and the maximum wait time in the 'Wait 1' field.



Q: As a receiver of referrals, can I specify referral inclusion and exclusion criteria on the Ocean directory listing?

A: Yes. Your Directory Listing can include information you wish about your practice and services you provide, including any referral criteria.

Q: Does Ocean let a user attach supplementary documents to a referral beyond the standardized form for those specialists who require test results and other documentation as part of a complete referral submission?

A: Yes, attachments can be added to the eReferral form before and even after submission. The attachment workflow varies depending on whether your Ocean site is integrated with your Electronic Medical Record (EMR) or if you are using Ocean eReferral through web access. Either way, uploading attachments is easy and quick to do!

Q: If the wait time provided by the receiver is greater than one year, how do users manage this in Ocean when referrals purge after a year?

A: Changes were made in Ocean recently so that eReferrals are now stored indefinitely until they are in a “terminal state” of either Completed, Cancelled, Declined, or Externally Managed (prior to this update, if an eReferral had an appointment booked more than one year away, the receiver had to ensure the eReferral stayed open so it would not be archived). For more information on eReferral archival rules, please refer to the OceanMD article [“How long are eReferrals stored after they are sent through Ocean?”](#)

Q: How is Ocean eReferral designed to manage larger practices with multiple administrators and clinicians, and what controls are in place to manage access and user permissions?

A: An Ocean site can have multiple users with administrative privileges, multiple clinicians, and can accept referrals for multiple health services. Users can apply filters to view only the clinicians or services they support. The design of an Ocean site does not currently allow for blocking certain clinicians’ referrals or services. During the onboarding process, our West Region eReferral Deployment Team will work with you and your clinic to discuss access and other considerations prior to setting up your Ocean site.

Q: Is there a way to assign priority to eReferrals based on urgency?

A: Yes. Receiving sites can use the Review Note functionality to choose a priority level and add any additional comments. The priority of the eReferral will then appear in the Priority column in the Ocean site so the priority status is easily identifiable for booking staff.

Q: Is Ocean just community-based, or can it be used in hospitals or other facilities?

A: Ocean eReferral is used in many hospital settings, as well as many primary care practices, specialist practices, etc. Approved health organizations in Ontario are eligible to use Ocean and receive onboarding support from Deployment Teams, all for no cost if they provide publicly funded services.

Ocean eReferral Questions - Accuro-Integration:

Q: How do I attach supporting documentation (e.g. reports, labs) from the patient chart to the eReferral?

A: Leveraging the “Generate Letter” process in Accuro, attachments can be easily selected and saved for Ocean. When you launch from Accuro into the Ocean Healthmap by using your “Send eReferral” CDS link, the attachments you saved will be pulled into Ocean and will be included with your eReferral form. Our West Region Deployment Team can help you configure a link in Accuro to streamline this process even further! Please reach out to westregion@amplifycare.com and we will be glad to assist!

Q: If Cumulative Patient Profile (CPP) information is included on an eReferral form, when the receiver accepts that referral, does the CPP information populate automatically into the patient chart?

A: When a receiving site using the Accuro EMR accepts a referral, Ocean creates the patient chart automatically (or updates the chart if it already exists). Ocean will upload a PDF of the referral into the patient chart, and any attachments will also be included. At this time, CPP information included on a referral form does not automatically populate into the appropriate fields into Accuro and needs to be entered manually.

Q: Are referrals tracked through the ORRO (Outstanding Requisitions, Referrals and Orders) feature in Accuro?

A: Referrals are not tracked through the ORRO feature. The recommended way to track referrals is through the Ocean Patient Dashboard, which you can access via the Accuro CDS Action and/or toolbar shortcut button. You also have the option to receive email notifications regarding any sent and/or received referrals, which notify you when an eReferral has been cancelled/declined, when an appointment has been made for a referral you sent, when a new message is received, etc.

Q: When does Ocean download a copy of the eReferral into the patient chart?

A: When a referral is first sent, a PDF copy of the referral will be added automatically to the patient chart in the sender’s Accuro EMR. For receivers using the Accuro integration, a PDF copy of the referral will be added to the patient chart upon acceptance of the referral, and an updated, final copy will be added to the patient chart once the referral has been marked (either manually or automatically) as Completed.

Accuro senders may choose to add a final copy of the eReferral to the patient chart after the referral has been completed by opening the Action Menu in that referral and selecting “Import to EMR”.

Q: When I accept an eReferral, where in Accuro does the PDF referral note get saved?

A: The referral note and any attachments are saved in Accuro either as an Encounter Note or a Document in the Virtual chart, depending on your Cloud Connect settings. Our West Region eReferral Deployment Team will discuss this with you during your EMR configuration session to ensure documents are being saved where it best suits you and your team.

Ocean eReferral Questions – TELUS PS Suite Integration:

Q: Can attachments be uploaded to the eReferral directly from the patient chart?

A: Yes, you can attach documents directly from the EMR! The Ocean integration with PS Suite makes it very easy to attach documents to your eReferral. Simply select (“green-bar”) the documents you wish to attach before you launch into the Ocean Healthmap. You can also add attachments from the EMR once you’ve begun populating the eReferral form, and you can send attachments even after the eReferral has been sent. Please refer to OceanMD’s article regarding [“Adding Clinical Notes from PS Suite”](#) for more information.

Q: Will the referral status be displayed in the EMR?

A: You will see referral status changes within the patient chart in the Ocean eReferral Custom Form (the status tracker with the Ocean logo that is added to the patient chart when a referral is sent). Status changes are displayed in this tracker, including Sent, Accepted, etc., and when the appointment has been entered in Ocean, that appointment will be displayed along with any messaging or instructions that were included.

Q: Does Ocean update the green Pending Tests/Consults tracker? Does the DI also create a Pending Consultation or a Pending DI as they go in two separate areas?

A: Sending clinicians can customize their PSS settings so that the Pending Tests/Consults tracker is entered in the chart and the first few steps are completed automatically. Ocean will automatically enter the type of Consultation or Diagnostic Imaging exam that was ordered, and will document where the referral was sent. The Ocean reference number will be entered in the Details field and the Activity will be marked as Active. TELUS PS Suite users will be required to update the Pending Tests/Consults tracker manually after this point.

Q: What is the workflow for when the Consultation is reconciled in the EMR when the consultation report/imaging results etc. are received? Does the DI also create a Pending Consultation or a Pending DI as they go in two separate areas?

A: You would manage the receipt of consultation reports, medical imaging results, etc. the same way for Ocean eReferrals that you would for a referral/requisition that you would have faxed.

Q: Does a PDF of the referral record get downloaded into the patient chart when the referral is sent and again when the referral has been completed? Is the answer different whether you are a Sender or Receiver?

A: When an Ocean eReferral is sent, a PDF copy of the referral will be automatically downloaded into the chart if the “Automatically Import Attachments to EMR” setting is enabled in your Cloud Connect configuration.

For eReferral receivers using PS Suite with the “Automatically Import Attachments to EMR” setting enabled, a PDF copy of the referral will be downloaded when you accept the referral (or manually import it), and a completed copy will download once the referral has been marked as Completed in Ocean.

If you would like assistance in setting up Cloud Connect or the Automatic Import feature, please connect with our team at Amplify Care (westregion@amplifycare.com).

Q: Can you connect multiple Ocean sites to a single PSS instance?

A: Yes, multiple Ocean sites can be connected to a single PS Suite instance. Please connect with our team at Amplify Care (westregion@amplifycare.com) to discuss how to set this up.

Q: If the patient already exists in the eReferral-receivers chart, will a duplicate chart be created by Ocean if they are referred again in the future?

A: A duplicate chart will not be created. Ocean scans for an existing chart using the health card number and date of birth. If a match is found, Ocean will update that patient chart if any patient demographics have changed (e.g. a new Version Code) and import the referral summary, etc. If no match is found, Ocean will automatically create a new chart.

Q: Knowing that Ocean can create a patient chart in PS Suite automatically when a referral is accepted, does Ocean allow for a workflow where the specialist would like to review incoming referrals in PS Suite before accepting or declining?

A: Yes! For receiving sites that prefer this workflow, instead of accepting or declining a newly received referral, the Ocean user can instead open the Action menu from within the referral and select “Import to EMR”. This will prompt Ocean to create the chart in PS Suite, insert a summary of the referral in the progress notes of the chart, and import the documents (if the “Automatically Import Attachments to EMR” feature is enabled in Cloud Connect). The referral can then be triaged in PS Suite and accepted or declined at a later time.

Ocean eReferral Questions – OSCAR Pro Integration:

Q: Can the Consultation EMR function in OSCAR Pro be used to track Ocean eReferrals?

A: Yes! When you send an eReferral, a new Consultation will be automatically generated in the patient’s chart. The status buttons on the left side of this Consultation will update automatically. For example, an eReferral in Ocean with a status of “Declined” will be displayed in the Consultation as “Completed”. When the appointment information has been added to the eReferral by the receiver, this information will also be added to the Consultation.

Q: How do I update a referral that has already been sent from OSCAR Pro?

A: To update an eReferral that has already been sent, open the patient’s Encounter chart, click the Consultation and then select the “Edit on Ocean” button. This allows you to update patient information, notes, message or cancel the referral.

Q: When I accept an eReferral, will Ocean create the patient chart? Is there any risk of chart duplication?

A: A duplicate chart will not be created. Ocean scans for an existing chart using the health card number and date of birth. If a match is found, Ocean will update the existing patient chart if any patient demographics have changed (e.g. a new Version Code). If no match is found, Ocean will automatically create a new chart.

Q: When I accept an eReferral, is the referral note saved in the patient chart? What happens to attachments?

A: Ocean eReferrals are saved as PDFs in the Documents section of the patient chart. Attachments are imported based on your Cloud Connect settings. If the “Automatically Import Attachments” feature is enabled in your Ocean Cloud Connect, the documents will import into the chart. If this feature is not enabled, they will appear as text-only Progress Notes.

Q: How do I track which referrals still need action without missing updates?

A: To track referrals that require action, use the Ocean Toolbar links, such as “View in Ocean” or the “# outstanding” indicator in the patient’s Encounter chart in OSCAR Pro. These provide a list of active referrals for follow-up.

You can also monitor the status of your referrals at any time by opening your Ocean site and monitoring the status folders (e.g. are there any referrals in the Booked Unconfirmed folder that still require a phone call to the patient, etc.)

Interested in getting started with Ocean eReferral?

If you would like to learn more about eReferral and have a West Region Deployment Team member contact you, please fill out our [Expression of Interest form](#).

Questions?

Please reach out to the West Region Deployment Team at Amplify Care at any time for support! We are here to help!

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🌐 www.amplifycare.com

